

# “Strategic Planning 101”

# What is Strategic Planning?

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*Strategic Planning* is a continuous and systematic process where people make decisions about intended future outcomes, how outcomes are to be accomplished, and how success is measured and evaluated.

# What is Strategic Planning?

*"...continuous..." Strategic planning is ongoing; it does not end with the publication of a plan; its success depends on it purposefully becoming an uninterrupted, and never-ending cycle – you need to live your strategic plan everyday.*

*"...systematic..." Any effective strategic planning process has a deliberate and specific methodology and a sequence of events; it is never haphazard.*

*"...process..." The value of strategic planning lies more in the journey than the destination. While strategic planning must indeed produce a product, a Strategic Plan document, the primary value comes from the teamwork, vision, commitment to and ownership of organizational success the people involved in planning gain through the process of making the decisions the document contains.*

# What is Strategic Planning?

*"...people..." A strategic planning process must involve all the right/a broad variety of people, and those people must be ready and willing to contribute to the process.*

*"...decisions..." Strategic planning is a decision making process. Organizations that are ready to plan strategically have leaders who are ready to make decisions.*

*"...outcomes..." Strategic level planning addresses external results, or the organization's effects on the outside world, particularly how it affects its stakeholders/customers. An old adage states: "If you don't know where you're going, any road will take you there." Strategic planning is primarily about defining where "there" is, a type of roadmap outlining the outcomes and results designed to be achieved throughout the journey.*

# What is Strategic Planning?

*"...how outcomes are to be accomplished..." Leaders don't stop at defining the target future; they go ahead and select the roads (processes/projects/services/programs) that will get them there.*

*"...how success is measured and evaluated." Strategic planning is all about succeeding. A well-written strategic plan will describe clearly how anyone can tell whether the organization is successful/measure success. The plan will measure intended future performance results either quantitatively or qualitatively, but it always defines threshold criteria for achieving success.*

# A good Strategic Plan answers four questions:

## 1. Who are we?

*(our reason for being; what do we believe and value; the needs that we exist to meet; the "business" that we are in; how do we create and deliver value to our stakeholders/customers?)*

## 2. Where are we going?

*(how our organization, our stakeholders/customers, and/or society as a whole will be different as we progress along the road to accomplishing our reason for being; what will this future look like?)*

# A good Strategic Plan answers four questions:

## 3. How we will get from here/today to where we are going?

*(where are we starting from and what does the roadmap to the future look like? what critical activities will we put our resources behind and how will this move us forward to the future?)*

## 4. How will we know that we are moving in the right direction/have been successful?

*(what measures will we use to monitor and manage the successful execution of our strategy?)*

# Why do Strategic Planning?

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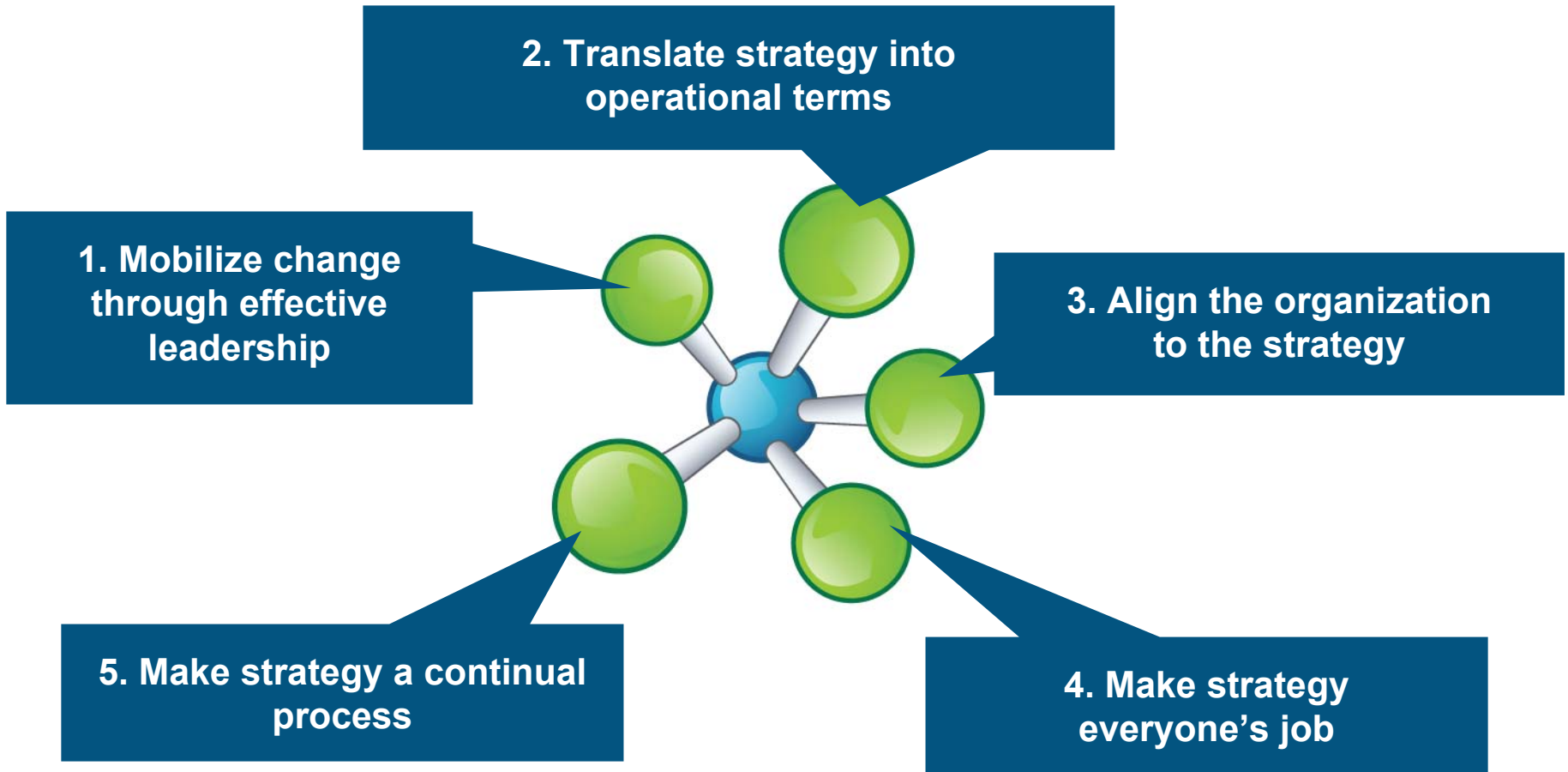
- ▣ To think more long-term
- ▣ To provide a framework and clarify future direction
- ▣ To manage diverse stakeholder needs
- ▣ To develop a rational basis for decision making
- ▣ To address major issues and solve organizational problems

# Why do Strategic Planning?

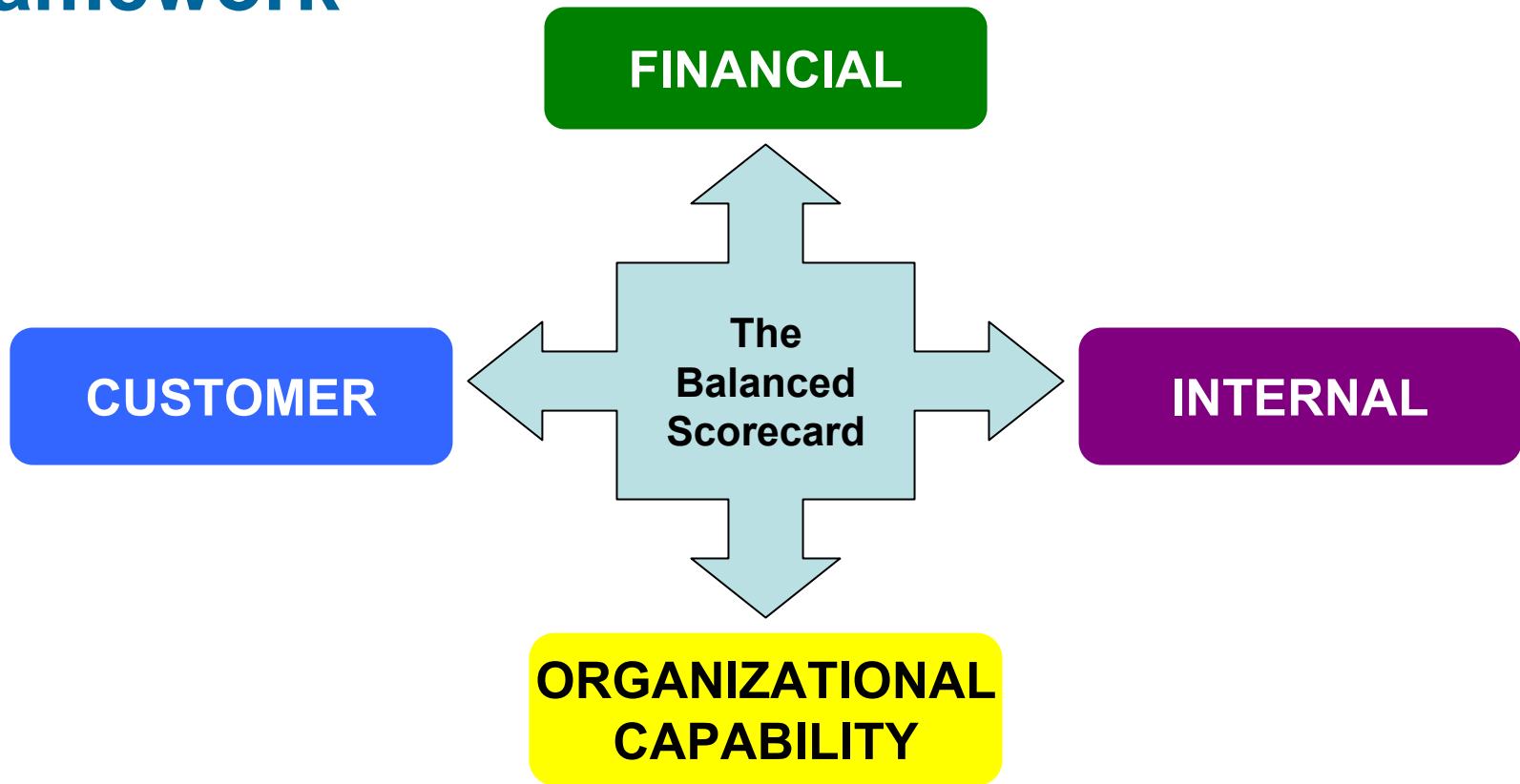
- ▣ To deal effectively and rapidly with changing circumstances
- ▣ To foster teamwork among stakeholders and employees
- ▣ To create uniform vision shared among stakeholders
- ▣ To increase levels of organizational commitment
- ▣ To set priorities

**Strategic Planning is a critical step  
in creating a strategy-focused  
organization and a high performance  
culture**

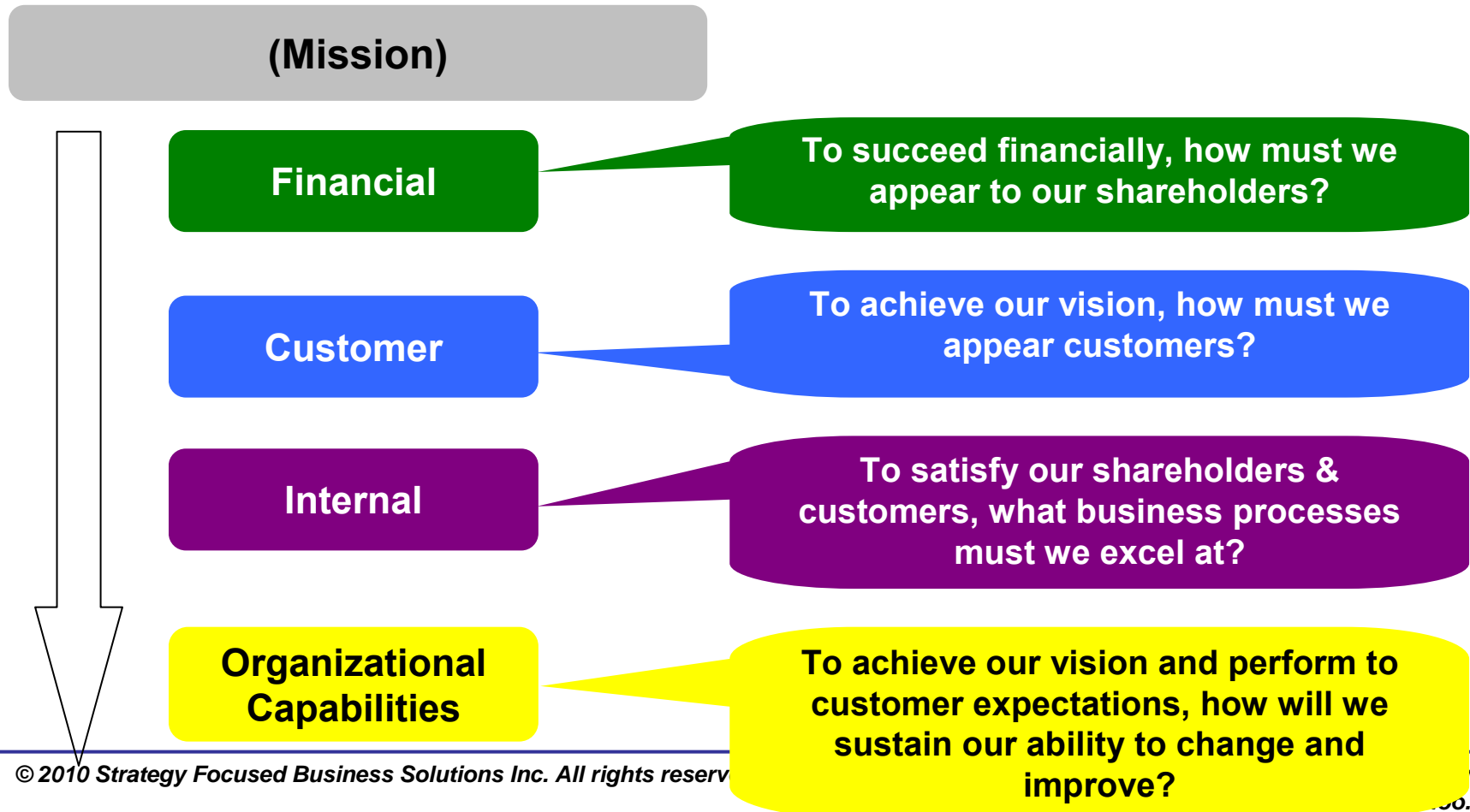
# The Strategy Focused Organization



# The Balanced Scorecard Planning Framework



## The Private Sector Balanced Scorecard Planning Framework



## The Public Sector Balanced Scorecard Planning Framework



# The Strategy Map:

## *A Critical Tool for Clarifying and Communicating Strategy*

## What is a Strategy Map?

- ✓ *It uses the same framework as the balanced scorecard*
- ✓ *It's a one page document that describes how your organization "creates value" and contributes at an actionable/operational level to the achievement of the overall strategy*
- ✓ *It provides a "picture" of your strategy*
- ✓ *It provides a uniform & consistent way of describing your strategy*
- ✓ *A visual representation of the cause & effect relationships between the components of your strategy (your "theory" of how everything/everyone works together to achieve results – the story of your strategy)*

**Mission:**  
Eliminating Cancer Everywhere

National  
Cancer  
Foundation

**Vision 2016:**  
Enable at least one game-changing cancer  
discovery.

*Stakeholder*

Be a Persuasive  
Advocate

Be the Trusted  
Leader

Be a Value-Added  
Partner

Be a Catalyst for  
Discovery

*Internal  
Process*

Implement an Effective  
Advocacy Process

Build Collaborative  
Partnerships

Optimize Stakeholder  
Engagement

Deliver Quick, Sound  
Funding Decisions

Pro-actively Understand & Assess Critical  
Issues, Trends, Needs, & Expectations

*Organizational  
Capabilities*

Develop Our Strategic  
Skills, Capabilities, &  
Knowledge

Focus on Effective  
Stakeholder  
Communications

Leverage Information  
Technology to achieve  
our Mission

*Financial*

Secure Timely &  
Adequate Funding

Ensure Maximum  
Value for Funds  
Invested

CORE VALUES

Transparency &  
Accountability

Professionalism

Compassion

Partnership &  
Collaboration

## Why Use a Strategy Map?

- ✓ *It provides teams with a tool to discuss the direction & priorities of their organization/work*
- ✓ *The strategy map provides the link between strategy formulation & strategy execution*

# The FOCUSED Planning Process - Process Objectives

1. Understand  
the Landscape

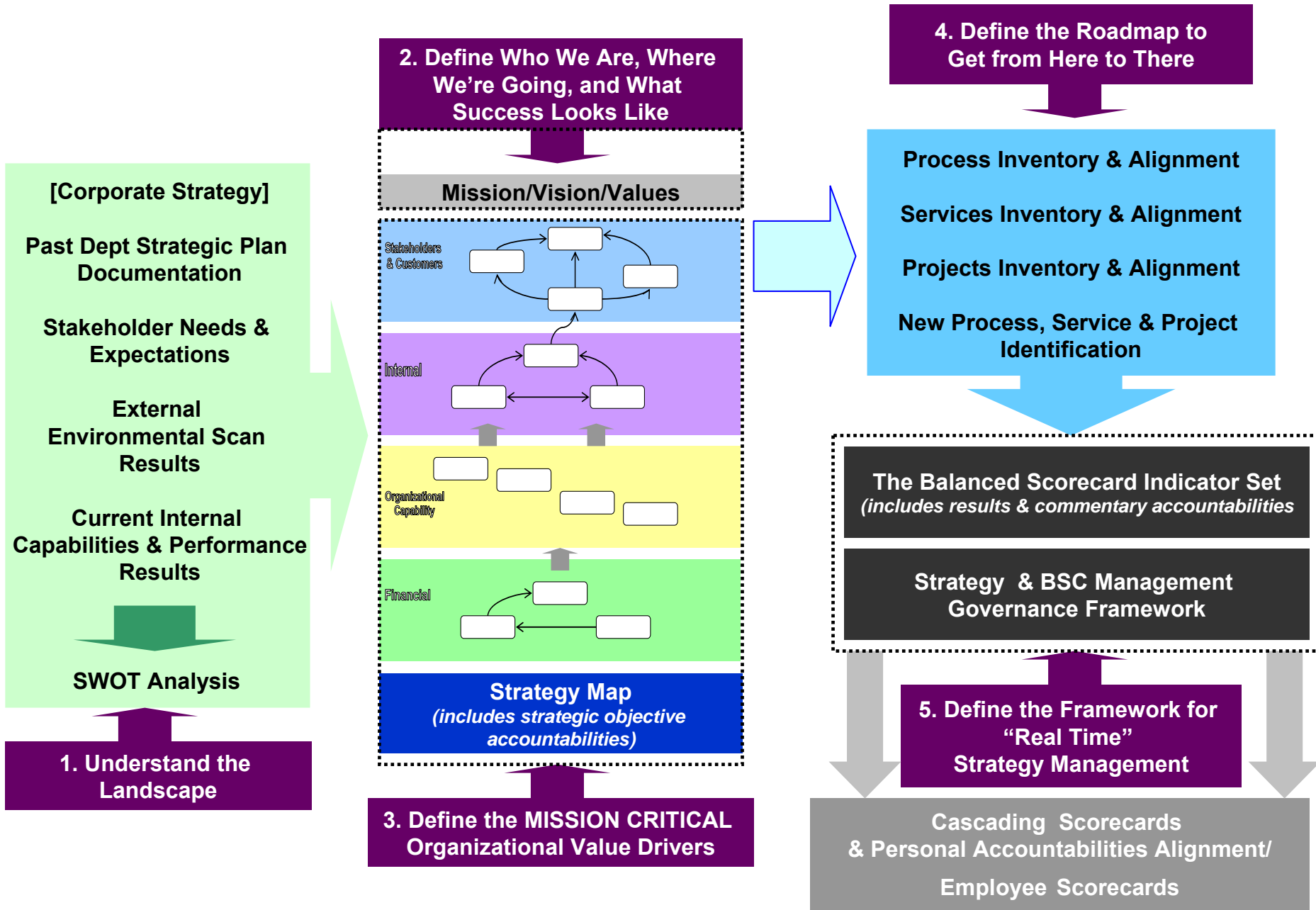
2. Define  
Who We Are, Where  
We're Going, and  
What Success Looks  
Like

3. Define  
the MISSION  
CRITICAL  
Organizational  
Value Drivers

4. Define  
the Roadmap  
to  
Get from  
Here to There

5. Define  
the Framework  
for "Real Time"  
Strategy  
Management

# The Strategic Planning Process



# A Sample Strategic Plan Format

1. Executive Summary
2. Background Information
3. Critical Issues in the operating environment  
(i.e. from external environmental scan and SWOT Analysis)
4. Stakeholder Identification/Stakeholder Needs  
Information & Key Issues
5. Company Core Values, Mission, & Vision

6. Strategy Map/Strategic Themes & Objectives  
(including definitions)

7. Process/Project/Program/Service Alignment

8. Strategic Projects  
(including scope, strategic objective alignment, & timelines)

9. Appendices  
(glossary of planning terms, environmental scan information, stakeholder analysis, SWOT Analysis, identified/prioritized gaps detailed strategic project plans, past & current financials, forecasts/budgets, etc.)